

CERTIFICATION INSTRUCTIONS

2011-2012 Tax Season

Updated 12/19/11

The IRS requires all Volunteers pass Volunteer Standards of Conduct Training and submit a Signed Volunteer Agreement the first day the volunteer. Tax Preparers, Reviewers, and Trainers MUST pass the appropriate tax certification tests and submit their signed Volunteer Agreement the first day volunteering in that capacity .

Certification Testing Options

A) In-Person Exam (required for 1st and 2nd year volunteers)

Registration for in-person certification options at www.dceitc.volunteerhub.com.

- **Basic Certification** (required for new volunteers)
- **Intermediate Topics & Certification Class** (This or basic certification required for 2nd year volunteers. Required for 3+ year volunteers who have not taken this class)
- **Advanced Topics & Certification (optional for all students)**

B) On Your Own Exam, using *Link and Learn*

Available for volunteers with 3 or more years of experience. 1st and 2nd year volunteers must attend a certification class.

Using the On-Line Practice Lab (for practice and testing)

Completion of the certification test requires preparing several tax returns. Volunteers are strongly encouraged to use Practice Lab to complete the tax returns and practice preparing tax returns.

WARNING: You must use **Internet Explorer** for the Practice Lab to function correctly.

- In Internet Explorer, go to: <http://www.voltaxprep.com/>
- Log in using the **password learntwo**
- Each year, the first time you log in, you need to create a unique **User ID**. **WRITE DOWN YOUR 6-digit User ID**. It **cannot** be retrieved if it is lost or misplaced.
- See the blue tabs in the 4012 for tips on using TaxWise Online. [Link to 4012 below.] See page 7-2 (page 127 in the PDF) for the shortcuts and how to get the red out. See page 8-5 and 8-6 for navigating and linking (pages 132-133 in the PDF)
- There is also a tutorial on the home page of the Practice Lab that provides guidance.
- You can save your work by using the **save button** at the top of the screen. When you log back into the Practice Lab with your UserID use the link "Show All Returns."
- While in a return, you need to press "save" for automatic calculations to happen. Example: after entering wages into box 1 of the W2, you need to click save (on the button bar at the top of the screen) for boxes 3, 4, 5, and 6 to calculate
- You will use your User ID to complete the SSNs and EINs when creating returns. The first three numbers of the SSN and EINs are provided in the scenarios. Replace the X's in the SSNs and EINs with the six digit User ID generated from the Practice Lab.
- Use the **Run Diagnostics** button to run Diagnostics in the Practice Lab.

Training Materials: Training materials will be handed out at training. Also available on-line:

- Volunteer Test Book: <http://www.communitytaxaidcc.org/doc/f6744.pdf>
- Pub. 4012: <http://www.communitytaxaidcc.org/doc/p4012.pdf>
- Volunteer Training Book: <http://www.communitytaxaidcc.org/doc/p4491.pdf>
- IRS Link & Learn Training: <http://www.irs.gov/app/vita/>
- Pub. 17: <http://www.irs.gov/pub/irs-pdf/p17.pdf>
- Practice Workbook (4491W): <http://www.irs.gov/pub/irs-pdf/p4491w.pdf>
- HSA and COD training and test booklet: <http://www.irs.gov/pub/irs-pdf/p4942.pdf>

How to Use the Link & Learn Test

IMPORTANT. READ THIS BEFORE TAKING THE TEST:

- (1) Link & Learn pulls questions from both the test and retest sections of the paper certification test (Form 6744). If you complete the test by hand before submitting online, be sure to answer both the test AND the retest questions first.
- (2) Complete the basic tax returns from scenarios 6 & 7 before starting the online test. You can prepare the returns by hand, or use the on-line Practice Lab. (See p. 1).
- (3) **You can get more training at the IRS Link & Learn site: <http://www.irs.gov/app/vita/>**

To log in to the test, go to: <http://linklearn.webtechteam.com/login.aspx>

- Click "Create an Account"
- You will be taken to the registration form
 - For **Group**, enter "1-VITA Volunteer" [*If you are a Site Coordinator, 7-Site Coordinator*]
 - After filling in remaining information, click **Register**.
- After confirming your information, you will be taken back to the login screen where you can log in right away. (You will receive an email with your username and password from DONOTREPLY@velocelearning.com, subject "Your LMS account has been created".)
- After you log in to begin your test:
 - The Volunteer Standards of Conduct Training should launch right away, if it doesn't:
 - Make sure your pop up blockers are off
 - Click on the "Volunteer Standards of Conduct" link
 - Under the "Launch Course" header, click on "Launch the Course Again"
 - If you do not finish the test in one sitting, you can save your work.
 - This first screen shows your test progress. Click on the tab for the next certification level (e.g. "Basic", "Intermediate", "Advanced") that you would like to complete.
 - Click the name of the next test that you would like to complete (e.g. "Basic Exam").

Printing & Submitting Test Results & Volunteer Agreement

After completing your **final** test:

1. On the right side of the screen, you will see a box that says, "You may sign your Volunteer Agreement electronically by checking this box."
 - Click on the box and Enter your password
2. Under the box, you will see "**Click here to open and complete your Volunteer Agreement**".
3. Click on the link. It will generate your volunteer agreement with your test results.
4. Click on the printer icon to print the form. [If you are unable to print, bring your username & password your first day. Your Site Coordinator will help you print your agreement.)
5. After printing the form:
 - Under volunteer position(s) enter the position(s) you will fill at this site this year. (Choose from: interpreter, savings promoter/intake, greeter/admin, food stamp specialist, tax preparer, site coordinator, reviewer, e-filer.)
 - Under Number of years volunteered make sure the correct number is entered (cross out and correct the number if necessary)
 - If any of the other fields are not filled in, fill them in
 - Under Volunteer Signature, sign the form
6. Make a copy of the Volunteer Agreement for yourself.
7. **All volunteers: Take your photo ID and the printed and signed volunteer agreement to your tax site the first day you volunteer. (If you volunteer at more than one tax site, you will need to take each site a copy of the agreement.)**
8. **Reviewers and Trainers**: also submit your test results to CTA one of these ways;
 - ♦ **Fax:** 202-521-3988 (no cover letter necessary)
 - ♦ **Email:** taxtestresults@yahoo.com, or
 - ♦ **Mail:** Community Tax Aid, 218 D Street SE, 1st Floor, Washington, DC 20003